

100

FIG. 1

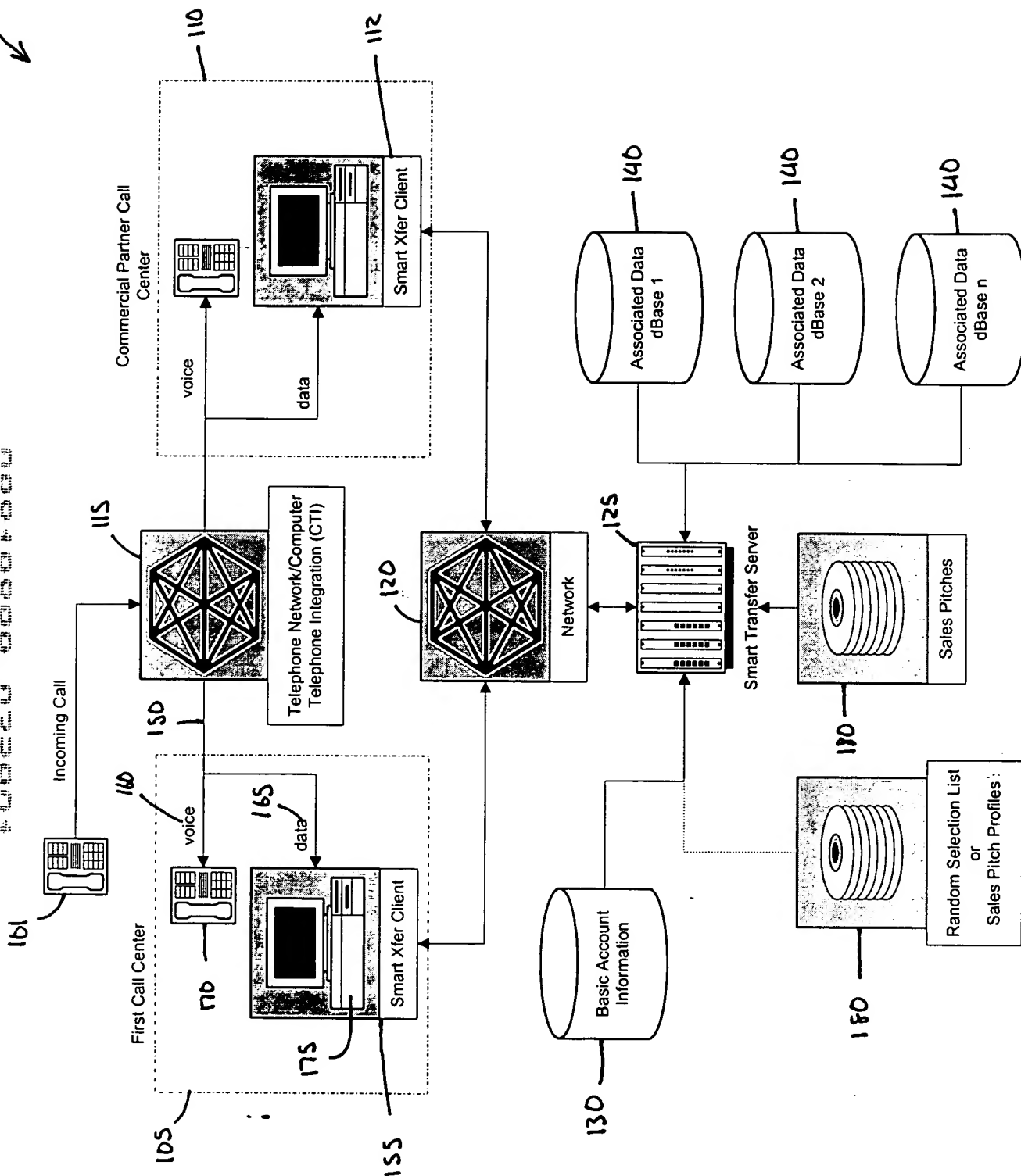


Fig. 1

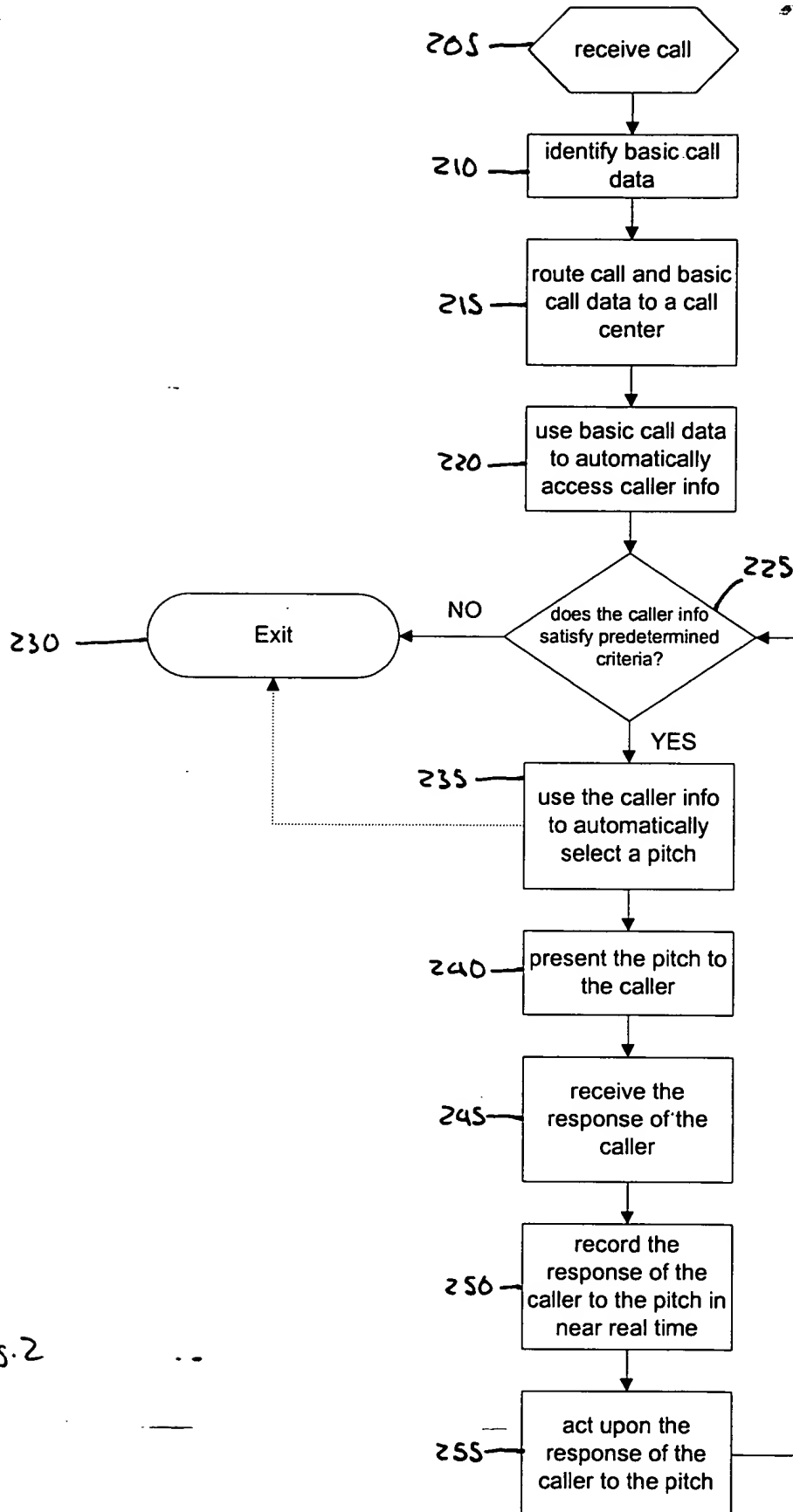


Fig. 2

300

	<b>CALLER INFORMATION</b>	
	<b>Basic Account Information</b>	
305	• account type	300A
310	• account status	
315	• method of payment	
	<b>Associated Information</b>	
320	<b>Caller Preference Information</b>	300B
322	• no preferences regarding any partner or offer, or	
324	• interested in a particular offer but did not have time to receive pitch during last call, or	
326	• interested in pitches relating to a particular partner's offers, or	
328	• not interested in pitches relating to a particular partner's offers, or	
329	• not interested in any offers	
330	<b>Historical Information</b>	
332	• history of past pitches presented	
334	• history of services or products purchased from pitch presenter or partners	
336	• listing of services or products currently enrolled in by caller	
338	• history of caller misbehavior (e.g., belligerent, illegal, TOS violation)	
340	<b>Credit Status of Caller</b>	
350	<b>Caller Demographic Information</b>	
351	• sex	
352	• age	
353	• marital status	
354	• place of residence	
355	• avocation	
356	• profession	

FIG. 3

Fig. 3

220

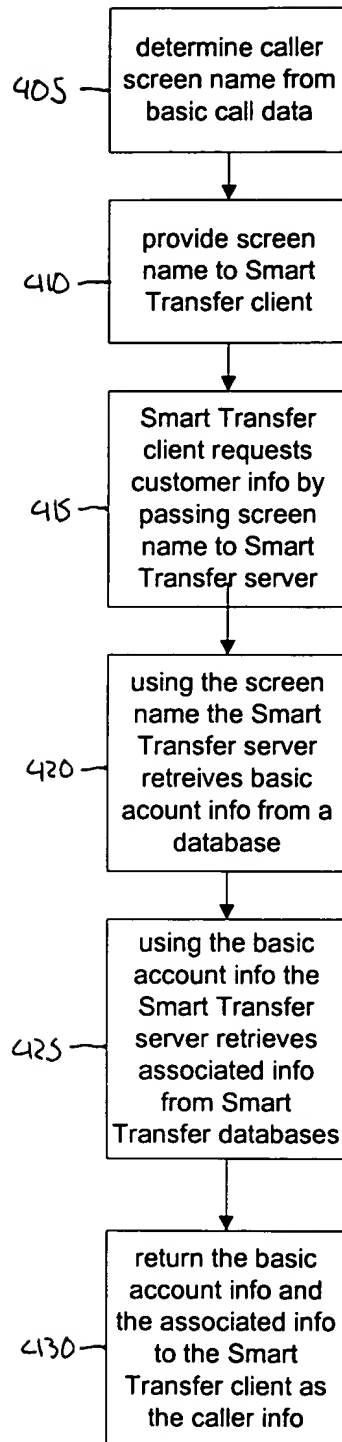


Fig. 4

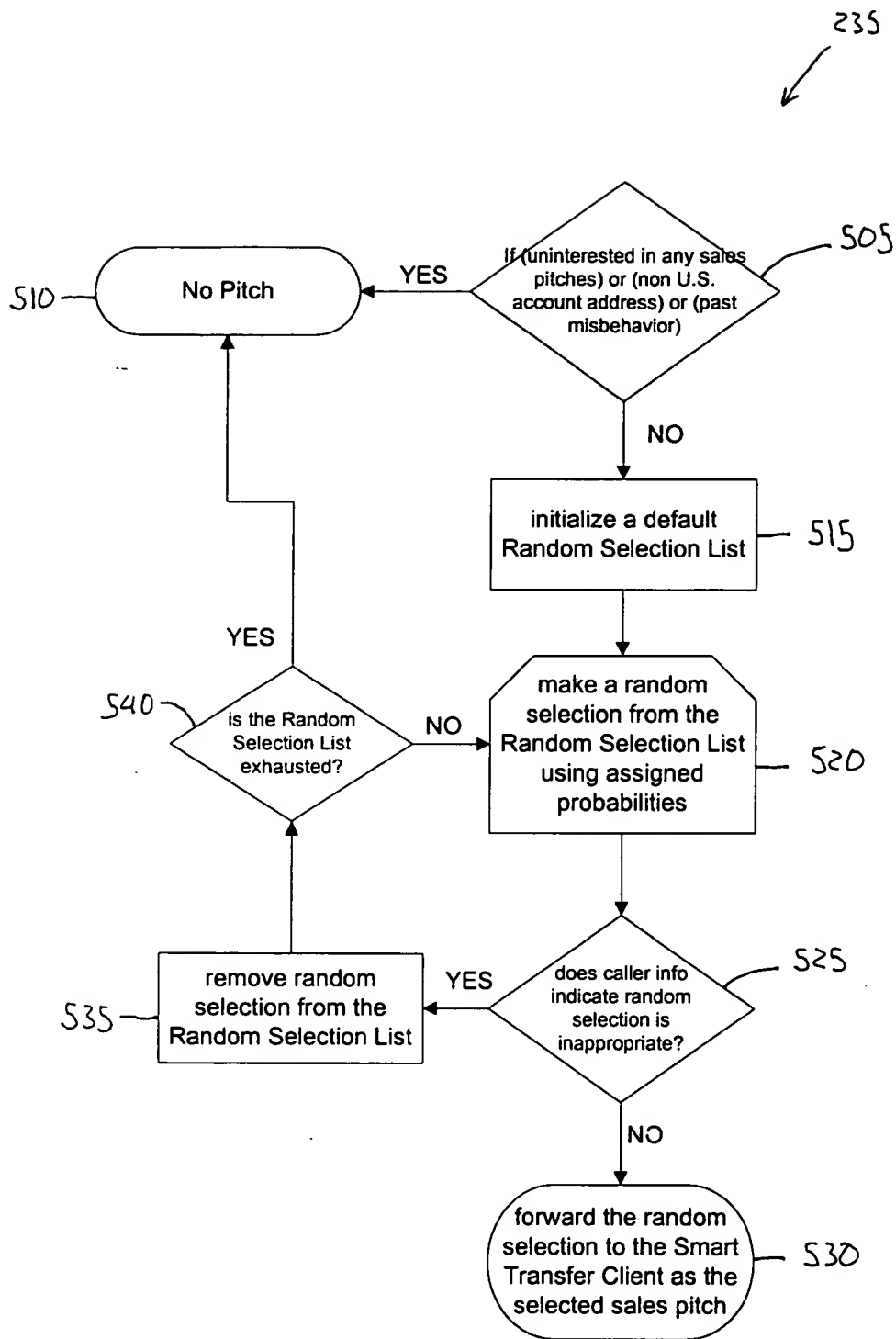


Fig. 5

235

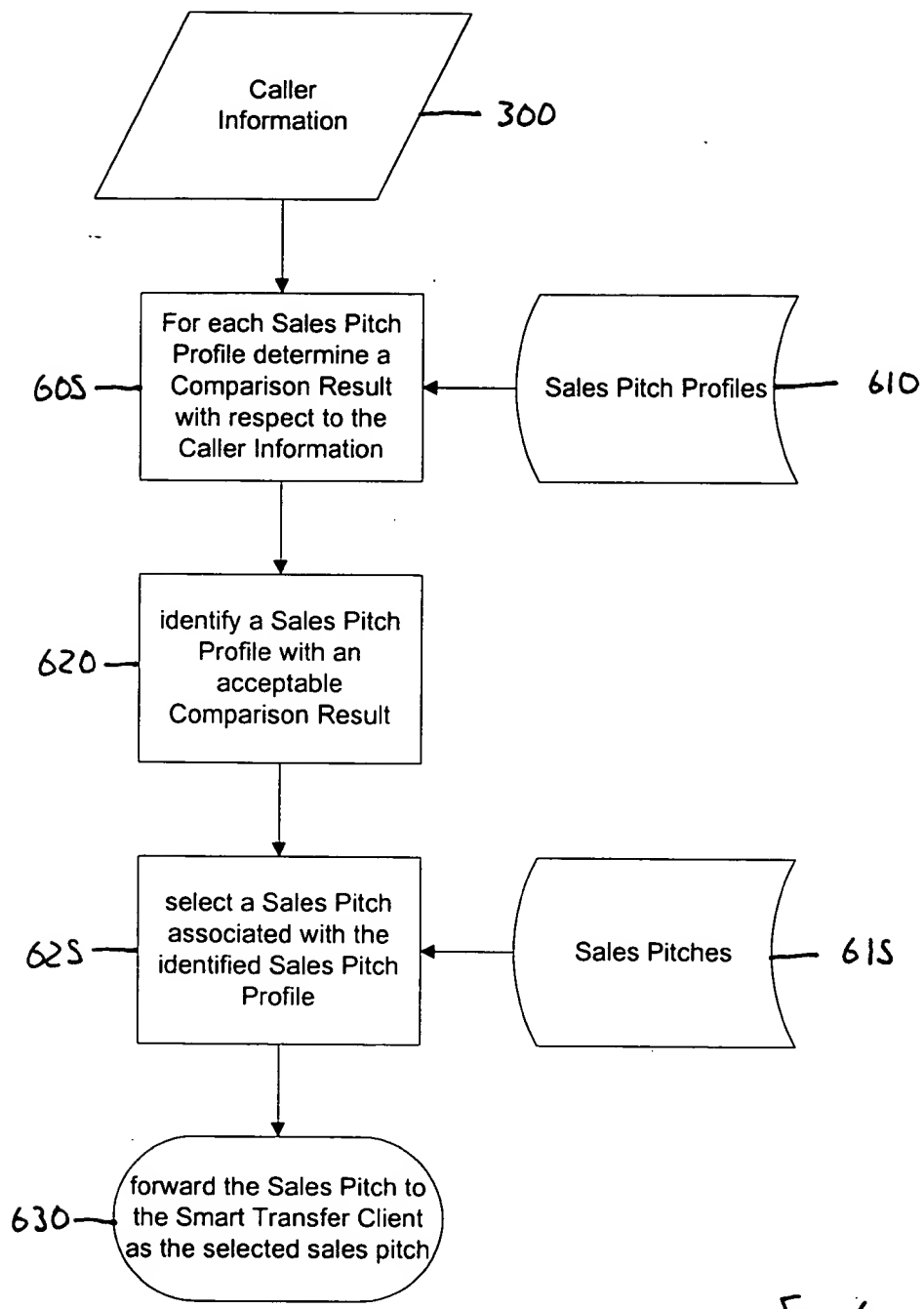


Fig. 6

710A                      300                      700A                      715A

↓                      ↓                      ↓                      ↓

Caller Information Data Field	Caller Information -	SALES PITCH PROFILE #1	Match?
		Match Criteria - 705A	
Caller Preference	no preferences	partner C products or services	yes
History of Past Pitches Presented	<ul style="list-style-type: none"> <li>• partner A - long distance</li> <li>• partner B - magazines</li> <li>• presenter - online account upgrade</li> </ul>	no prior pitch to caller regarding wireless service provided by partner C	yes
History of Services or Products Purchases from Pitch Presenter or Partners	<ul style="list-style-type: none"> <li>• presenter - online account upgrade</li> <li>• partner B - subscribed to music club</li> </ul>	any	yes
Listing of Services or Products Currently Enrolled in by Caller	<ul style="list-style-type: none"> <li>• presenter - online account upgrade</li> </ul>	no current enrollment in wireless service offered by partner C	yes
History of Caller Behavior	no misbehavior	no misbehavior	yes
Credit Status of Caller	AAA+	AAA or better	yes
Account Information			
<ul style="list-style-type: none"> <li>• account type</li> </ul>	platinum	any	yes
<ul style="list-style-type: none"> <li>• account status</li> </ul>	delinquent	paid up	no
<ul style="list-style-type: none"> <li>• method of payment</li> </ul>	credit card - 730A	credit card - 725A	yes
Caller Demographic Information			
<ul style="list-style-type: none"> <li>• sex</li> </ul>	F	any	yes
<ul style="list-style-type: none"> <li>• age</li> </ul>	28	18 or greater	yes
<ul style="list-style-type: none"> <li>• marital status</li> </ul>	M	any	yes
<ul style="list-style-type: none"> <li>• place of residence</li> </ul>	Durham, NC	United States	yes
<ul style="list-style-type: none"> <li>• profession</li> </ul>	financial analyst	any	yes
<ul style="list-style-type: none"> <li>• avocation(s)</li> </ul>	scuba, music, stock market	any	yes

Fig. 7A

700B  
↓

715B  
↓

Caller Information Data Field	Caller Information	SALES PITCH PROFILE #2	Match?
		Match Criteria	
Caller Preference	no preferences	partner C products or services	yes
History of Past Pitches Presented	<ul style="list-style-type: none"> <li>partner A – long distance</li> <li>partner B – magazines</li> <li>presenter – online account upgrade</li> </ul>	no prior pitch to caller regarding upgraded wireless coverage provided by partner C	yes
History of Services or Products Purchases from Pitch Presenter or Partners	<ul style="list-style-type: none"> <li>presenter - online account upgrade</li> <li>partner B - subscribed to music club</li> </ul>	any	yes
Listing of Services or Products Currently Enrolled in by Caller	<ul style="list-style-type: none"> <li>partner A – online account upgrade</li> </ul>	no current enrollment in upgraded wireless coverage offered by partner C	yes
History of Caller Misbehavior	no misbehavior	no misbehavior	yes
Credit Status of Caller	AAA+	AAA or better	yes
Account Information			
<ul style="list-style-type: none"> <li>account type</li> </ul>	platinum	any	yes
<ul style="list-style-type: none"> <li>account status</li> </ul>	delinquent	paid up	no
<ul style="list-style-type: none"> <li>method of payment</li> </ul>	credit card – 730B	check – 725B	no
Caller Demographic Information			
<ul style="list-style-type: none"> <li>sex</li> </ul>	F	any	yes
<ul style="list-style-type: none"> <li>age</li> </ul>	28	18 or greater	yes
<ul style="list-style-type: none"> <li>marital status</li> </ul>	M	single	no
<ul style="list-style-type: none"> <li>place of residence</li> </ul>	Durham, NC	United States	yes
<ul style="list-style-type: none"> <li>profession</li> </ul>	Financial Analyst	any	yes
<ul style="list-style-type: none"> <li>avocation(s)</li> </ul>	scuba, music, stock market	any	yes

Fig. 7B



895 — Caller Information Data Field	Caller Information	SALES PITCH PROFILE #3	825 ↓ Criteria Weight	820 ↓ Match? /Match Value	810 ↓ Weighted Match Value
		Match Criteria — 815			
895 — Caller Preference	Prefer to not receive any sales pitches	not adverse to partner C products or services	20 — 896	no/-1 L894	-20 — 897
History of Past Pitches Presented	<ul style="list-style-type: none"> <li>partner A — long distance</li> <li>partner B — magazines</li> <li>presenter — online account upgrade</li> </ul>	no prior pitch to caller regarding wireless service provided by partner C	2	yes/1	2
History of Services or Products Purchases from Pitch Presenter or Partners	<ul style="list-style-type: none"> <li>presenter - online account upgrade</li> <li>partner B - subscribed to music club</li> </ul>	any	0	yes/1	0
Listing of Services or Products Currently Enrolled in by Caller	<ul style="list-style-type: none"> <li>presenter — online account upgrade</li> <li>partner C — wireless service</li> </ul>	no current enrollment in wireless service offered by partner C	10	no/-1	-10
History of Caller Misbehavior	no misbehavior	no misbehavior	0	yes/1	0
Credit Status of Caller	AAA+	AAA or better	2	yes/1	2
Account Information					
870 — • account type	platinum — 883	silver - platinum — 875	1 — 880	yes/1 — 885	1 — 890
840 — • account status	delinquent — 855	paid up — 845	2 — 850	yes/-1 — 860	-2 — 865
• method of payment	credit card	any	0	yes/1	0
Caller Demographic Information					
• sex	F	any — 830	0	yes/1	0
• age	28	18 or greater	10	yes/0	0
• marital status	M	any	0	yes/1	0
• place of residence	Durham, NC	United States	10	yes/0	0
• profession	financial analyst	any	0	yes/1	0
891 — • avocation(s)	scuba, music, stock market	any — 835	0 — 892	yes/1	0 — 893

Profile Correlation Value: -27 ← 805

Fig. 8

900

SALES PITCH LOOK-UP TABLE	
Sales Pitch Profile - 610	Sales Pitch - 615
Profile 1	Pitch 1
Profile 2	Pitch 2
Profile 3	Pitch 3
...	...
Profile n-1	Pitch n-1
Profile n	Pitch n

610-615-610

Fig. 9

1000-0000-0000

PARTNER	PROGRAM	DISTRIBUTION (within Partner)	SCRIPT
Internal (25% of Total)	Sign On a Friend	100%  1005 →	<p>"I would like to let you know that we will give you \$50 every time you sign on a friend or family member before April 30<sup>th</sup>. This will assist you in adding more friends and family to your Talk list and in keeping in touch. We'll be happy to mail out a 500-hour Free trial disc of our Latest Software to your friend or family member. Once that friend or family member has been a member for 90days, we'll mail you a check for \$50!</p> <p>Who do you have in mind?</p> <p>If NO: "OK, Happy we were able to assist today."</p> <p>If YES: "Great, I'll just process this order for the Free Trial Software to be mailed out immediately. Who else would you like us to send a Free Trial Software package to?"</p> <p>Thank you and have a great day."</p>
Partner A (35% of Total)	Voyagers' Edge	70%  1010 →	<p>"Before I let you go, I want you to know that we have arranged for you to receive a Getaway Weekend and a free trial membership in our Voyagers' Edge program. May I connect you for more details?"</p> <p>If YES: "Great, I'll transfer you now."</p>
	Emerald Vista	30%  1015 →	<p>"Before I let you go, I want you to know that we have arranged for you to receive a Free Personal Electronic Organizer and a free trial membership in our Emerald Vista program. May I connect you for more details?"</p>
Partner B (30% of Total)	Long Distance Service	100%  1020 →	<p>"For being a valued Member you are eligible TO EARN UP TO THREE MONTHS OF our Service for trying an exclusive member benefit. What I'm going to do is bring someone on the line who can give you all of the details . . . OK?"</p> <p>If YES: "Great, I'll transfer you now."</p>
Partner C (10% of Total)	Magazine Trial	100%  1025 →	<p>"Because you are a valued customer, we've arranged for you to try up to 2 magazines free for 2 months. You can choose from Entertainment by the Minute, Wealth, The Beautiful and The Famous, Athletics Illuminated, or Epoch"</p> <p>If YES: "May I connect you for more information?"</p>

fig 10

250

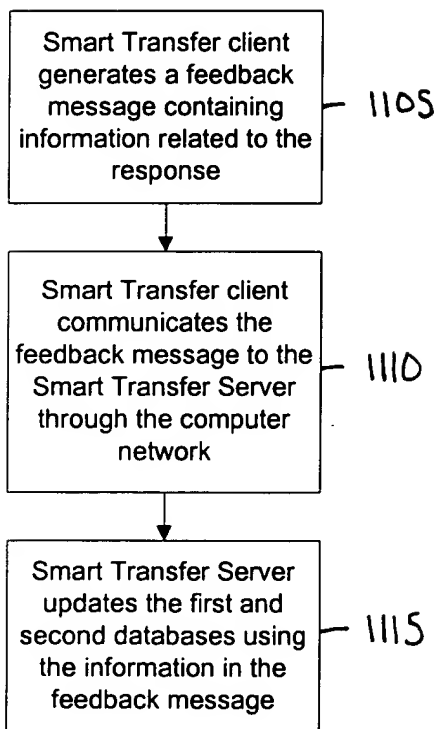


Fig. 11

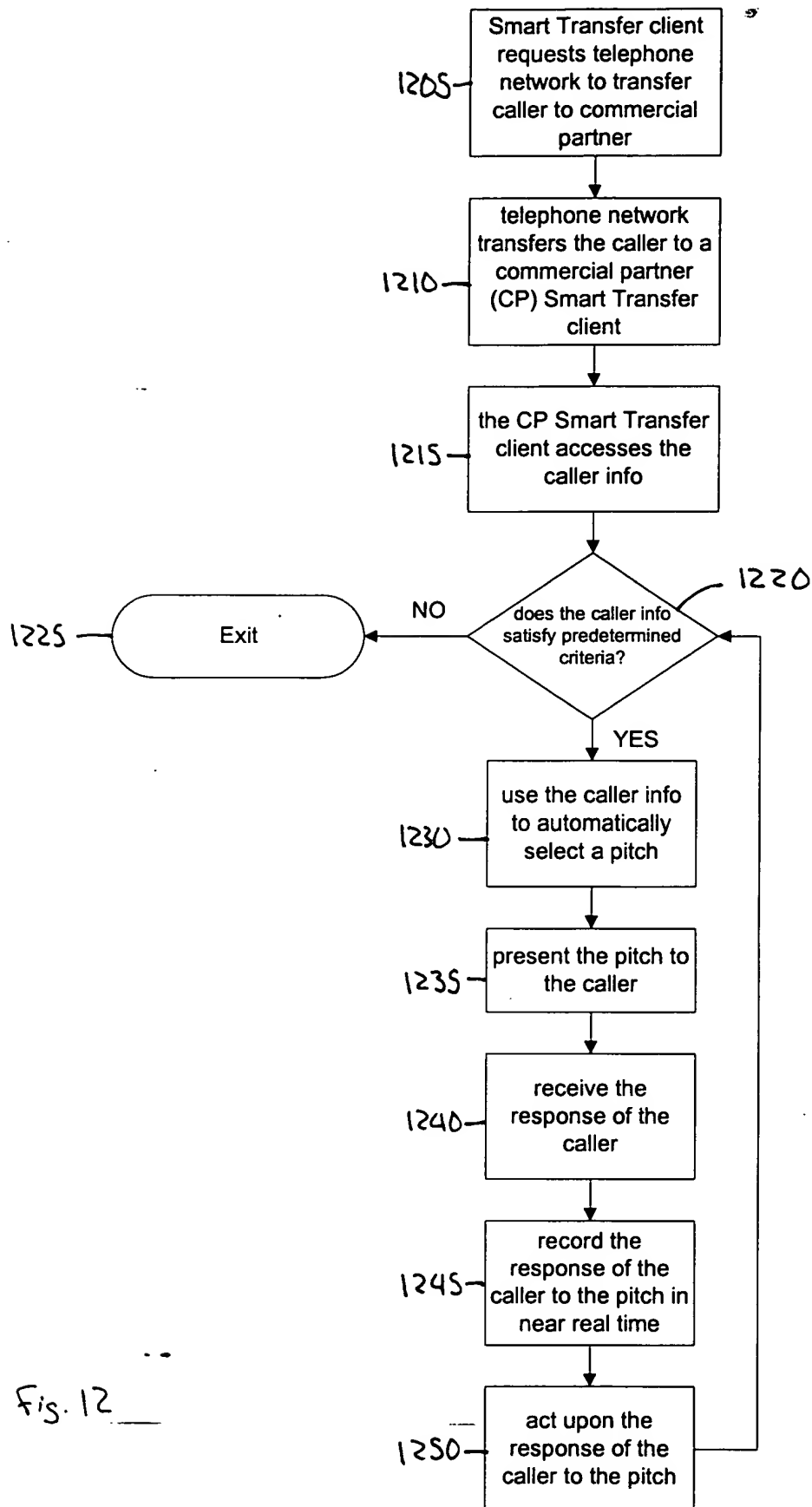


Fig. 12